



Regional Engagement

Presenters:
Mark Leggott (Canada)
Leslie McIntosh (US)

Agenda

Introductions

RDA & Regional Engagement: History and Context

A Framework for RDA Regions

Questions



RDA & Regional Engagement: History and Context

RDA 2013-2015: Phase 1

- Community-driven organization
- With the goal of building the social and technical bridges to enable open sharing of data
- Founding Funders:
 - European Commission
 - National Science Foundation and National Institute of Standards and Technology
 - Australian Government, Department of Innovation

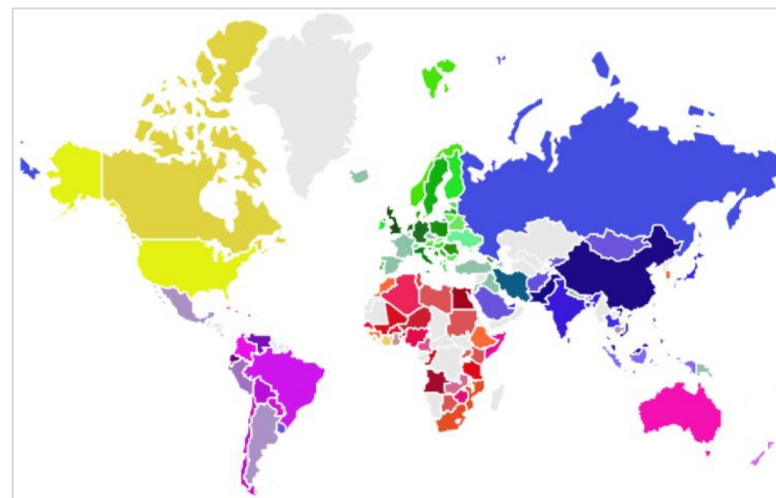
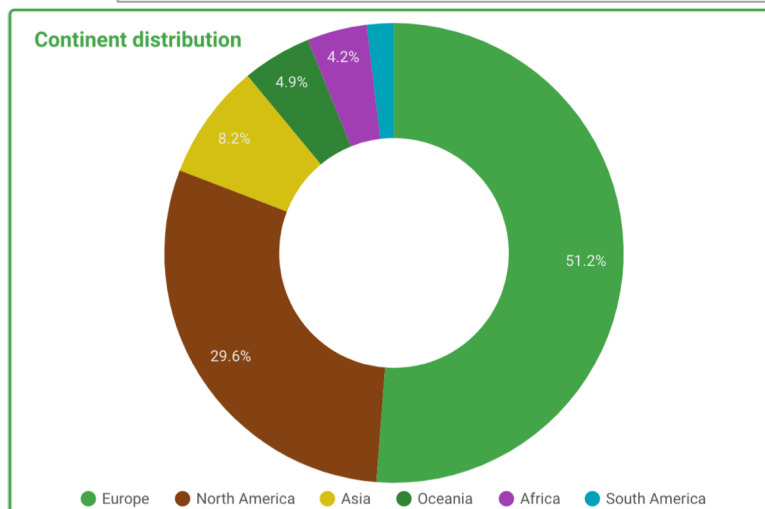
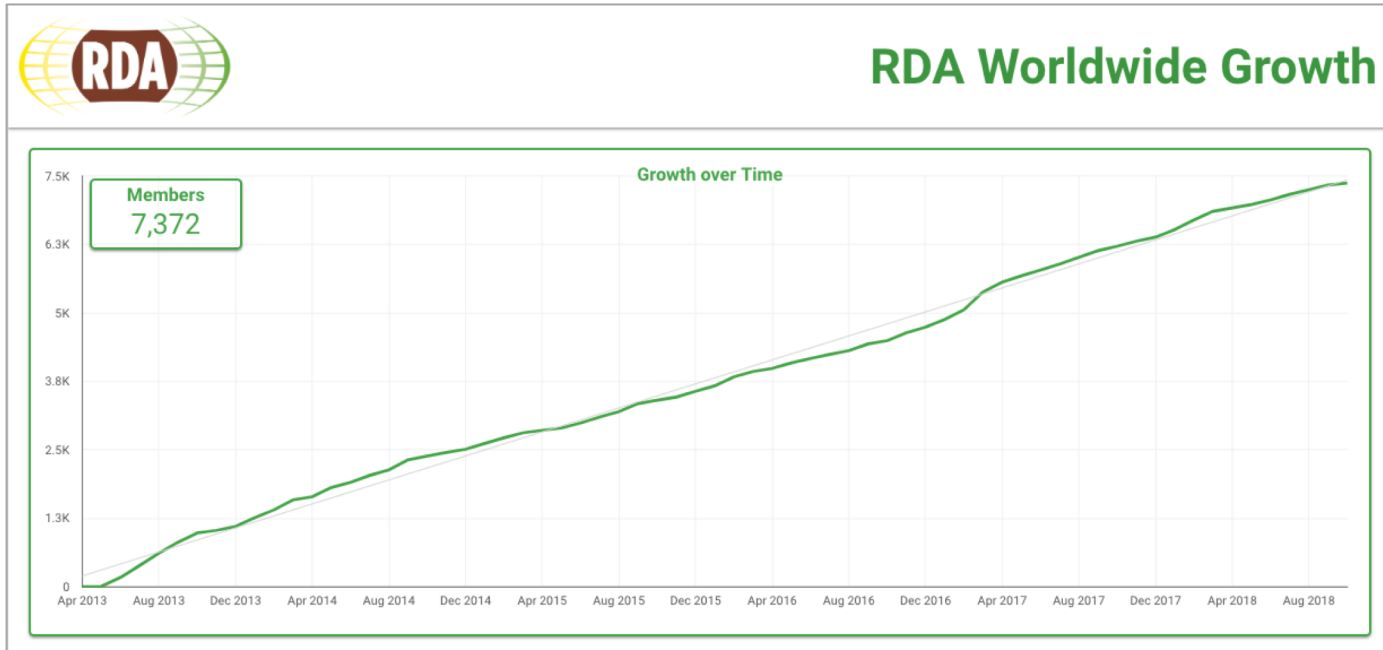
RDA 2015-2017: Phase 2

- RDA should be an agile organisation responding to change while continually planning for an impactful future
- Council charged a small planning group to lead a “future directions” strategic planning activity for RDA: workshop, engagement activities, survey
- Produced a report outlining activities to advance:
 - external communications
 - member engagement
 - general coordination of the organisation
- January 2016 Council approval

RDA 2017: Phase 3

- RDA well-known brand in the global science community, with a high reputation
- Rapid growth of the RDA organization in membership and activities
- Organizational limits are reached
- Landscape has evolved

7500 members & 137 countries in 5 years!



RDA staffing and resources



Hilary Hanahoe
Secretary General
Research Data Alliance
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Stefanie Kethers
Director of Operations
Australian Research Data Commons
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Sara Pittonet Gaiarin
Web Manager
Trust-IT Services Ltd.
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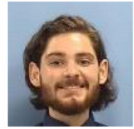
Yolanda Meleco
Communications Manager
Rensselaer Polytechnic Institute
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Marieke Willems
Outreach & Impact
Coordinator
Trust-IT Services Ltd.
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Socio-technical Coordinator
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Adoption Manager
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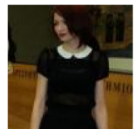
Support team



Daniel Bangert
Outreach & impact support
Göttingen State and University
Library
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Fotis Karayannis
Affiliates & Organisational members
Liaison
ATHENA Research Center
[View Profile >>](#)



Alexandra Delipalta
Plenary support
Digital Curation Centre
[View Profile >>](#)



Ilaria Fava
Document Management Support
Göttingen State and University
Library
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- Full time Secretary General
- 2.5 FTE in addition to do everything else - administer RDA, run plenaries, maintain website...

How does this calculate?

- 2,087 working hours per person per year, according to US Office of Personnel Management
- 7304 total hours available in Secretariat
- 7200 members and growing

Focus areas RDA Council

Creation of 4 Council Subcommittees (November 2017)

- Value proposition for the different stakeholders
- Growth management
- Financial and organizational sustainability
- **Regional engagement**

Regional Engagement work

- RE Council Subcommittee, chaired by Fran Berman, produced a White Paper
- Complex topic with many aspects (financial, governance, etc.)
- March 2018 P11 in Berlin:
 - Regional Engagement meeting: overview of regional perspectives, Council perspective
 - RE Task Force of regional representatives
 - Start of a much larger conversation in which Council and regions worked together

Regional Engagement work

- March-Nov: regular calls regional representatives and Council members
- Document outlining the relationships between RDA and the Regions, and a framework for the expectations and management of regional partners.
- June: draft framework reviewed by Council
- P12 Gaborone: open regional engagement meeting to present and discuss the draft framework document with a wider regional audience



A Framework for RDA Regions

for consultation

Drafted by the Regional Engagement Task Force (Vivian Haga, Jason Haga, Sarah Jones, Mark Leggott, Leslie McIntosh-Borrelli, and Tomasz Miksa) with contributions from various observers and RDA Council members

Proposal

- Develop strong partnerships with Regional members to ensure the ongoing success and sustainability of RDA
- Seen as two halves of one whole
 - Regions help RDA reach out to local membership
 - RDA gives Regions an international forum & voice

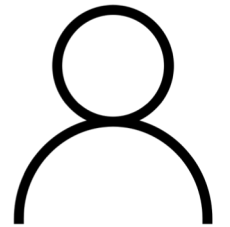


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<https://www.flickr.com/photos/80497449@N04/8691983876>

RDA membership categories

- **Regions (proposed)**
 - To be defined with you!
- **Organisations**
 - 47 members and 8 affiliates
 - Funders, publishers, universities, service providers, representative bodies....
- **Individuals**
 - 7500 people from over 137 different countries
 - Researchers, librarians, funders, industry.....



What is a Region?

An RDA Region is loosely defined as a “national level” geographic entity or consortium of “national-level” entities, and is intended to be broadly representative.

RDA will not decide the level on which Regions should be formed. It is for individual countries or consortia to define what model best suits their context and culture. This decision should remain flexible and open to change as circumstances require.

Mutual Benefits

Value to RDA	Value to RDA Regions
Communication and Marketing	
e.g. RDA outputs are disseminated to data practitioners and research communities within and across Regions.	e.g. Provision of a global forum for the discussion of RDM issues/opportunities.
Promoting Best Practices	
e.g. The vision, mission and principles of RDA are cascaded via Regional activities.	e.g. Participation in defining best practices internationally provides validation at the Regional level.
Development of Community	
e.g. Richer inputs and collaboration on RDA work via a growing network of Regional and individual members.	e.g. Value of participation in a larger international community of stakeholders.
Achieving Efficiencies and Standardization	
e.g. Regions facilitate the flow of funds and resources (e.g. Council, Secretariat) that allow the business of RDA to happen.	e.g. A more efficient approach, as there is less tendency to invent more than once.

See All Benefits at <https://drive.google.com/drive/folders/1Ba6j-k3lyqkyeFUc0iLaeqZ68qUOfDto>

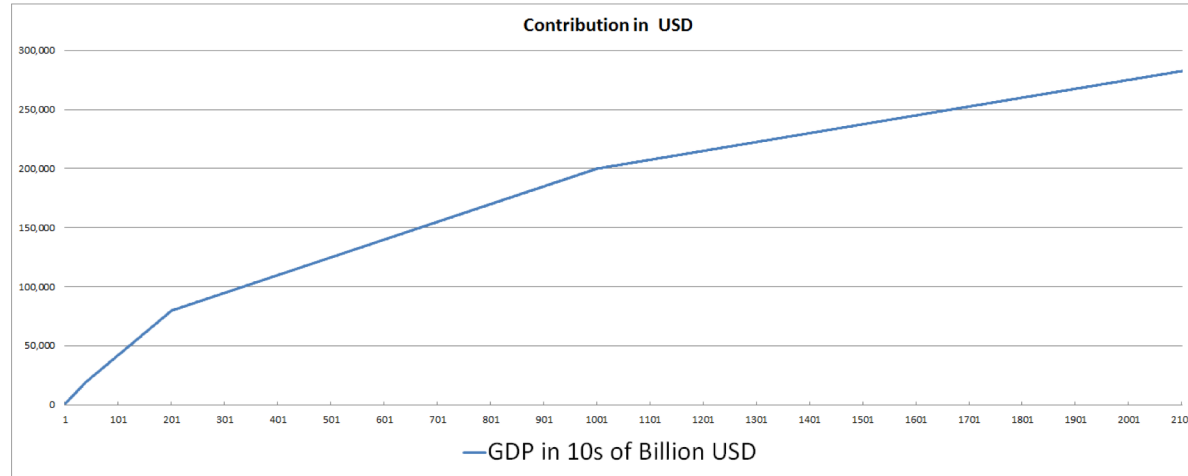
Reciprocal Contributions

Regions to RDA	RDA to the Regions
<ul style="list-style-type: none"> • Promoting RDA activities • Fostering a diverse data community • Supporting participation in plenaries • Yearly financial contribution (scaled) • Staff time to Secretariat • Hosting plenaries 	<ul style="list-style-type: none"> • Sustaining a dynamic international forum • Organisational support for plenaries and co-located events • Hosting Regional websites • Official support/approval for use of RDA brand • Marketing and advocacy materials • Feature Regional activities in global comms • Supporting Regional fundraising goals • Secretariat attendance at events & lobbying • Small grants to assist in Regional activities

Benefits to Regions and RDA need to balance



Propose scaled financial contributions



GDP from (USD Millions)	GDP to (USD Millions)	Contrib from (USD)	Contrib to (USD)
\$0	\$80,000	\$1,250	\$5,000
\$80,000	\$400,000	\$5,000	\$20,000
\$400,000	\$2,000,000	\$20,000	\$80,000
\$2,000,000	\$10,000,000	\$80,000	\$200,000
\$10,000,000	\$50,000,000	\$200,000	\$500,000

Suggested cash contributions

- Japan: \$123,082 USD
- Canada: \$66,989 USD
- Netherlands: \$35,983 USD
- Finland: \$13,057 USD

Potential In-kind Contributions

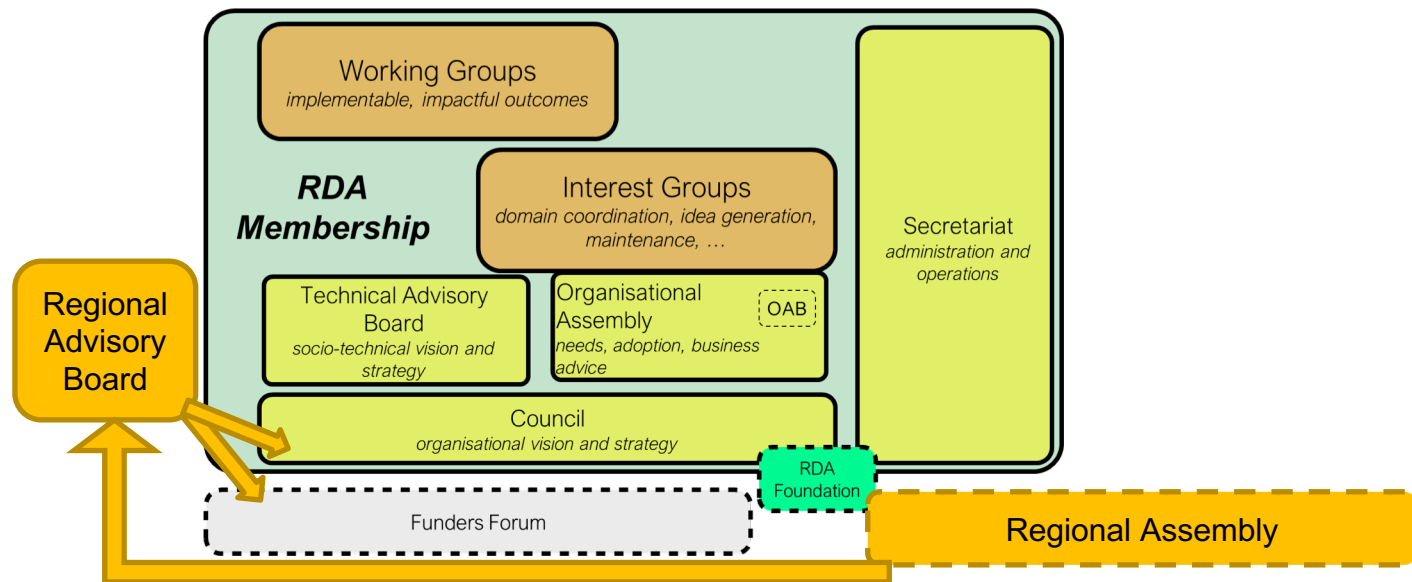
- Communications and Marketing Expert
- Outputs and Adoption Expert
- Technological Expert
- Events Manager
- Community Engagement Expert
- Operations / Process Expert
- Project Manager
- ...

All support staff should have fluent written and spoken English.

In-kind support will be agreed between the RDA Foundation and Region.

Proposed (new) governance structures

- **Regional Assembly**
to give contributing, new and aspiring Regions a voice in the business and strategy of RDA
- **Regional Advisory Board**
will consist of one representative from each contributing Region
the Regional Advisory Board will elect Co-Chairs to participate on Council as observers
- **Funders Forum**
Funders from contributing Regions will be invited to participate in the Funders Forum



Legitimacy of Regions

It is for Regions to administer their own activities that:

- represent a diverse range of communities and stakeholders;
- reflect interests and needs of the broad data community;
- have activities to support RDA growth and the adoption of outputs;
- uphold RDA Principles (where not in conflict with local law);
- collaborate when multiple entities seek to represent a Region or if regional boundaries overlap;
- will be recognised through a Formal Arrangement.

Formal Arrangements

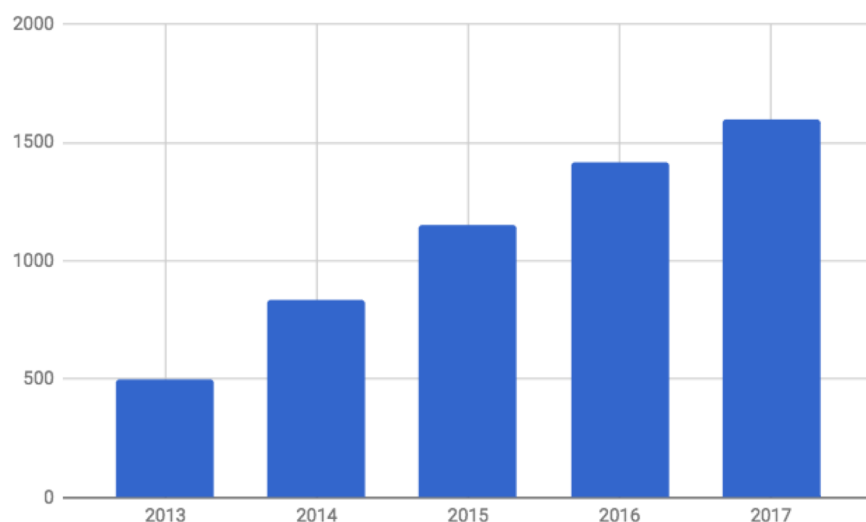
- Partnership will be tailored to each context (No standard arrangement that covers all Regions)
- Will cover following for each party:
 - strategic efforts and activities;
 - contributions (Monetary, in-kind, support commitments);
 - Code of conduct
 - RDA Regional Partnership Framework (as reference).
- Arrangement will be supplemented by annual discussions on activities and contributions.

RDA Region North America

RDA-RNA Strategic Goals

1. Membership and Engagement
2. Adoption and Implementation
3. Sustainability

1. Membership and Engagement



United States n=1599

2013	500
2014	337
2015	313
2016	264
2017	185

1. Membership and Engagement

Canada (n=148)

2013 33

2014 37

2015 20

2016 18

2017 40

Mexico (n=12)

2013 2

2014 4

2015 1

2016 1

2017 4

https://docs.google.com/spreadsheets/d/e/2PACX-1vRegoK0p9vNcpn7ulAzp_tc8On1XYQC0MkMrXCUGFn00tF7x7IVeLQPH2vK_xUryS3cf20S9jk3_MGC/pubchart?oid=1302240549&format=interactive

Membership and Engagement

Broaden across:

- Sectors (e.g., industry, non-profit, academia)
- Disciplines (e.g., biomedical)
- Region (e.g., Indigenous, Canada, Mexico)

Adoption and Implementation

- Formalize partnerships with North American organizations
- Facilitate webinars and workshops on RDA work
- Develop robust help guides and online documentation for RDA outputs (~3/year)
- Create feedback loop and assessment mechanism for adoption to further refine the RDA outputs

Sustainability

Forming an independent entity

Build a revenue stream

- Service partnerships
- Collaborations with other organizations
- Grants
- Fundraising
- Products

RDA-RNA Overview with Strategic Plan & Metrics

Next Steps

- ✓ Open Consultation period
- ✓ Finalization of the document by the Regional Engagement Task Force
- ✓ Council approval by early 2019
- ✓ RDA Regions Web section - <https://www.rd-alliance.org/groups/rda-regions>

2019 Q1:

- Implementation of financial and governance aspects
- One-to-One discussions with regions

Questions?

